MARYLAND JUDICIARY

GEARS
General Enterprise And Resource Support

Quick Reference Tip Sheet

General Information

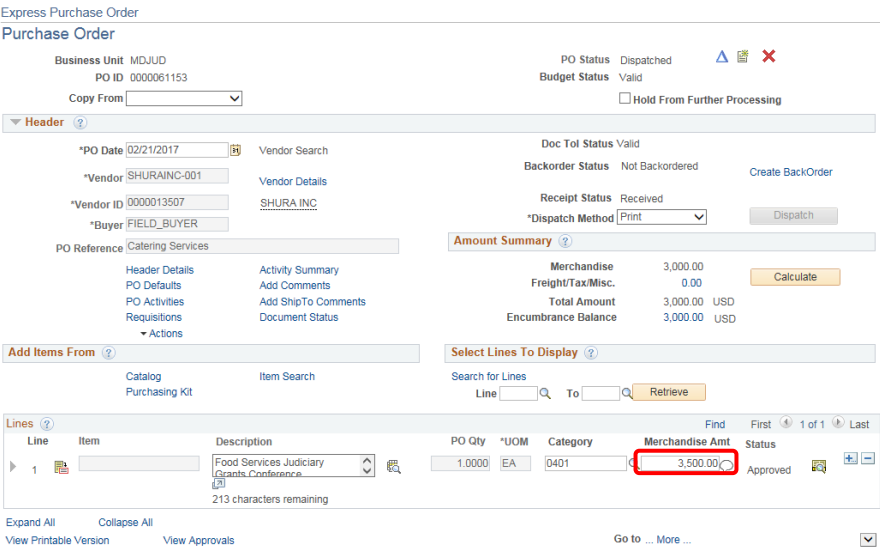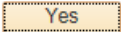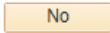| Task	Process Information
Creating a Change Order for an Express Purchase Order	When you update an Express PO that has been dispatched, you create or append a change order in GEARS. Additions, deletions, and/or changes to an Express PO line or schedule will create a change order. Updates to an Express PO may include things such as: • Increase price/amount or quantity • Add a line to a PO, <u>OR</u> • Change distribution or shipping information **NOTE**: Changes to Express POs may require that the Express PO be (1) resubmitted for approval; (2) budget checked; and (3) Dispatched.

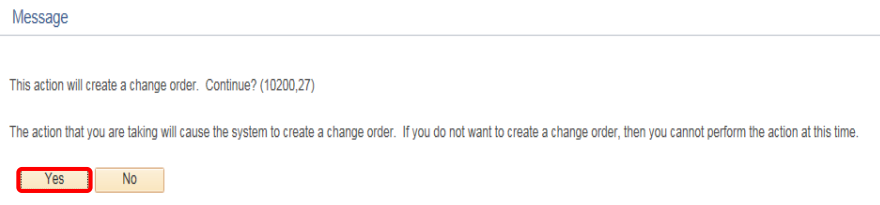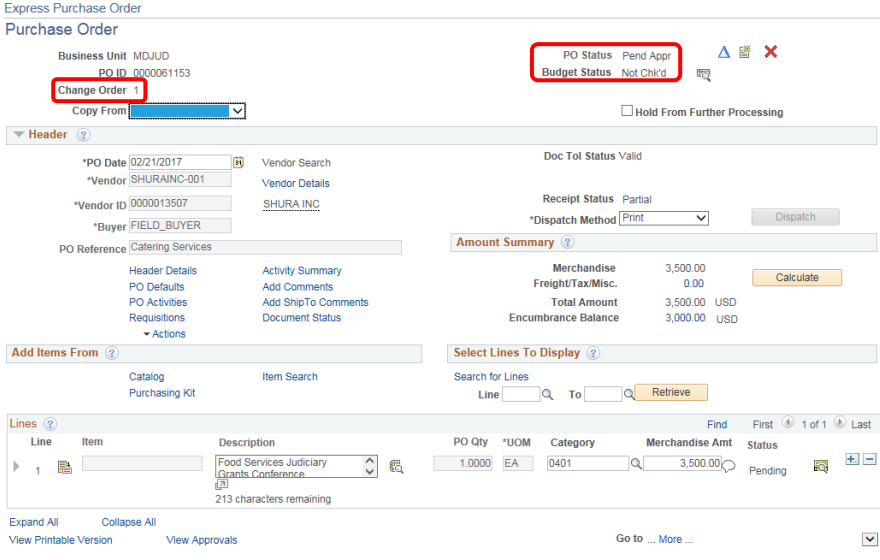**GEARS Navigation**

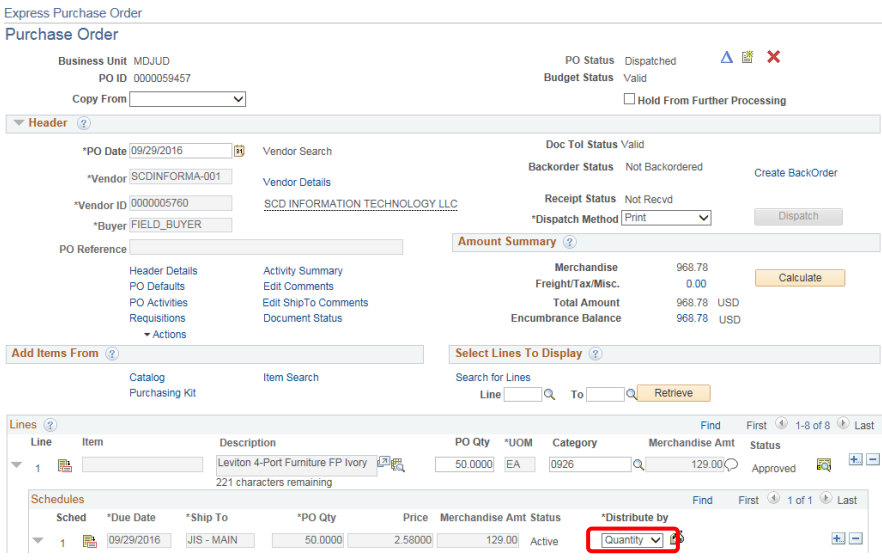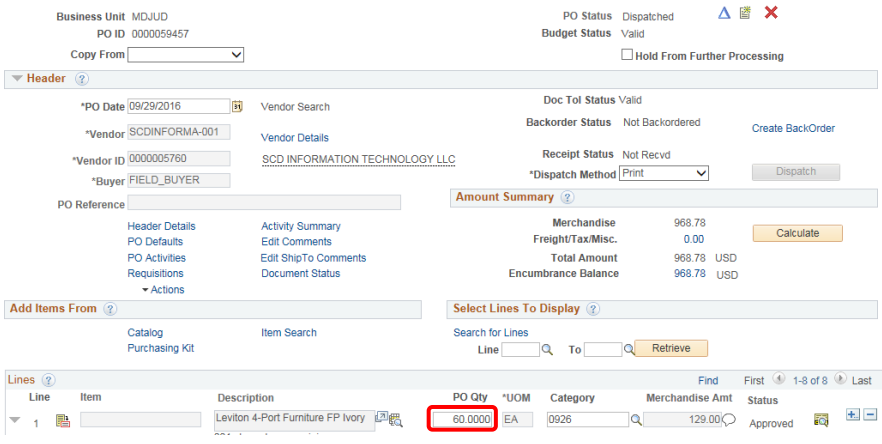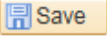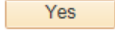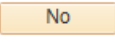| Purchasing > Purchase Orders > Add/Update Express POs	Favorites ▾ Main Menu ▾ › Purchasing ▾ › Purchase Orders ▾ › Add/Update Express POs
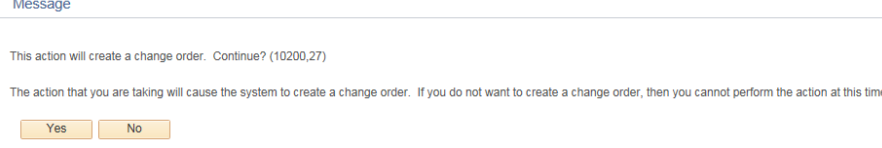
1.0   Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.
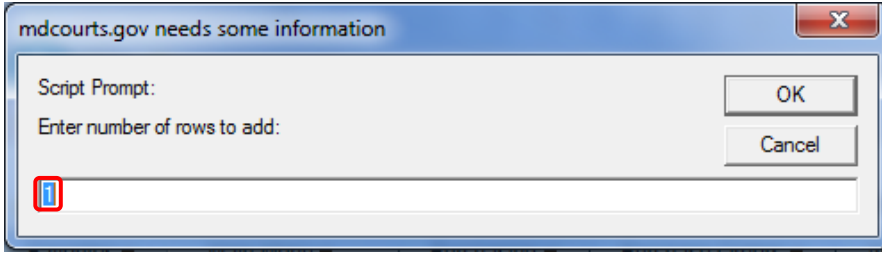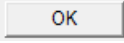
STEP	ACTION	DETAILS
1.	**Locate the existing Express PO that you want to update by selecting the "Find an Existing Value" Tab.**	**Express Purchase Order** Enter any information you have and click Search. Leave fields blank for a list of all values. [Find an Existing Value] [Add a New Value]

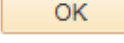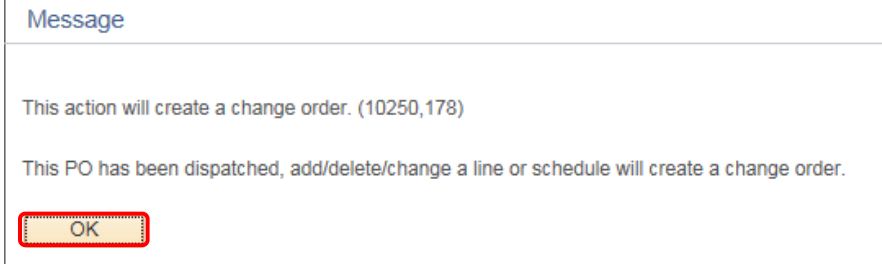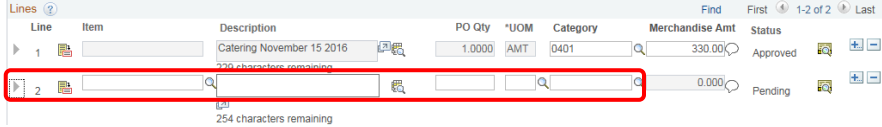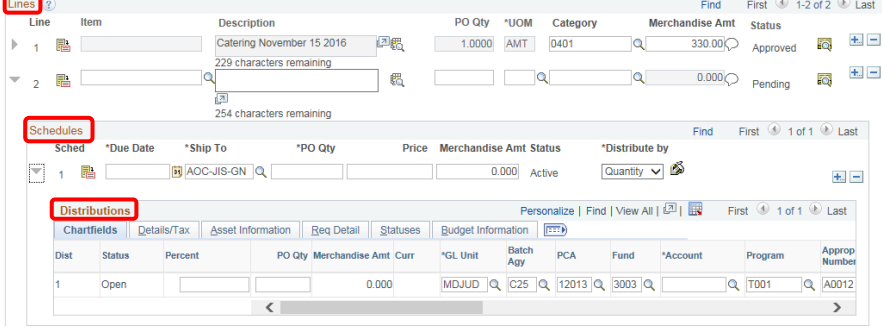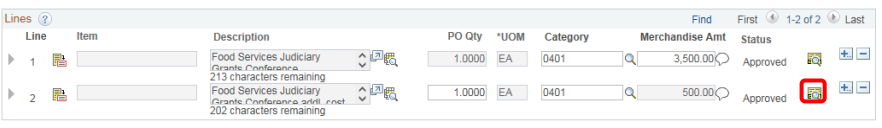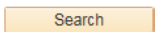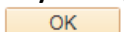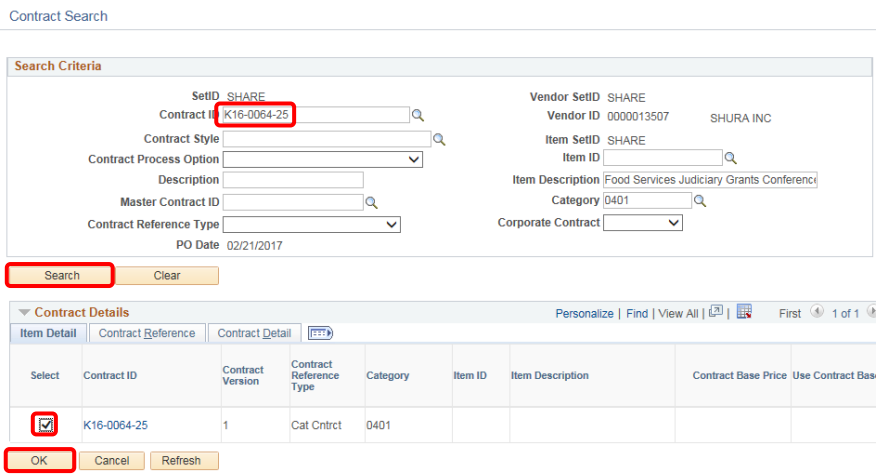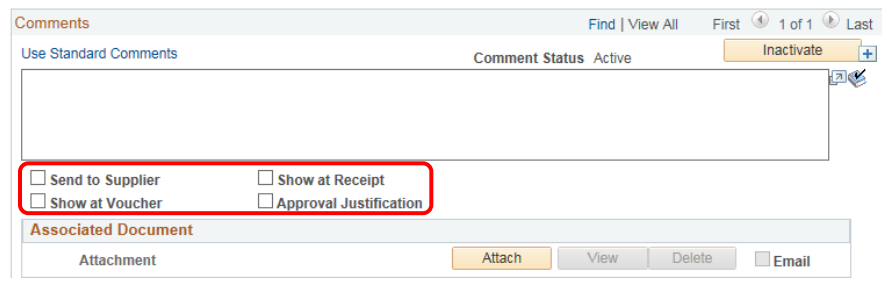| 2.	Enter the PO number or enter fields in the Search Criteria. In this example, PO ID *0000061153* is entered.	**Express Purchase Order** Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value Add a New Value ▼ Search Criteria Business Unit = ▾ MDJUD 🔍 PO ID begins with ▾ 0000061153 ✕ Purchase Order Date = ▾ 📅 PO Status = ▾ ▾ Short Vendor Name begins with ▾ 🔍 Vendor ID begins with ▾ 🔍 Vendor Name begins with ▾ 🔍 Buyer begins with ▾ 🔍 Buyer Name begins with ▾ 🔍 PO Type = ▾ ▾ Purchase Order Reference begins with ▾ **Hold From Further Processing** ☐ ☐ Case Sensitive Search Clear Basic Search 📑 Save Search Criteria
3.	Click the **Search** button.	

4a.	**For "Amount Only" Express POs –**
	
	NOTE: Steps 4a through 4e allow you to change the amount of the Express PO.
	
	The Express PO MUST be "Amount Only" to change the amount. Click on the Line Details icon to confirm.
		Express Purchase Order
		Purchase Order
		
		Business Unit MDJUD PO Status Dispatched △ 📋 ✕
		PO ID 0000061153 Budget Status Valid
		Copy From ▾ ☐ Hold From Further Processing
		▼ Header ?
		*PO Date 02/21/2017 📅 Vendor Search Doc Tol Status Valid
		*Vendor SHURAINC-001 Vendor Details Backorder Status Not Backordered Create BackOrder
		*Vendor ID 0000013507 SHURA INC Receipt Status Received
		*Buyer FIELD_BUYER *Dispatch Method Print ▾ Dispatch
		PO Reference Catering Services
		    Amount Summary ?
		Header Details Activity Summary Merchandise 3,000.00 Calculate
		PO Defaults Add Comments Freight/Tax/Misc. 0.00
		PO Activities Add ShipTo Comments Total Amount 3,000.00 USD
		Requisitions Document Status Encumbrance Balance 3,000.00 USD
		▾ Actions
		Add Items From ? Select Lines To Display ?
		Catalog Item Search Search for Lines
		Purchasing Kit Line 🔍 To 🔍 Retrieve
		
		Lines ? Find First ◀ 1 of 1 ▶ Last
		Line Item Description PO Qty *UOM Category Merchandise Amt Status
		▾ 1 📄 Food Services Judiciary 1.0000 EA 0401 🔍 3,000.00 Approved ➕ ➖
		     Grants Conference
		     213 characters remaining
		
		Schedules Find First ◀ 1 of 1 ▶ Last
		Sched *Due Date *Ship To *PO Qty Price Merchandise Amt Status *Distribute by
		▾ 1 📅 02/01/2017 JIS - MAIN 1.0000 3,000.00000 3,000.00 Active Amount ▾ ➖
		
		Distributions Personalize | Find | View All | 📑 | 🔢 First ◀ 1 of 1 ▶ Last
		Chartfields Details/Tax Asset Information Req Detail Statuses Budget Information ▸
		Dist Status Percent Merchandise Amt Curr *GL Unit Batch PCA Fund *Account Program Approp Approp Y
		                       Agy Number
		1 Open 100.0000 3,000.00 USD MDJUD C25 90001 0001 0401 B009 A0009 AY2017
		
		Expand All Collapse All
		View Printable Version View Approvals Go to ... More ... ▾
		
		Under the **Attributes** section:
		Confirm that the Amount Only checkbox is turned on.
		
		▼ **Attributes**
		Physical Nature Goods ▾
		*Price Qty Schedule Quantity ▾
		*Price Date PO ▾
		☑ Amount Only
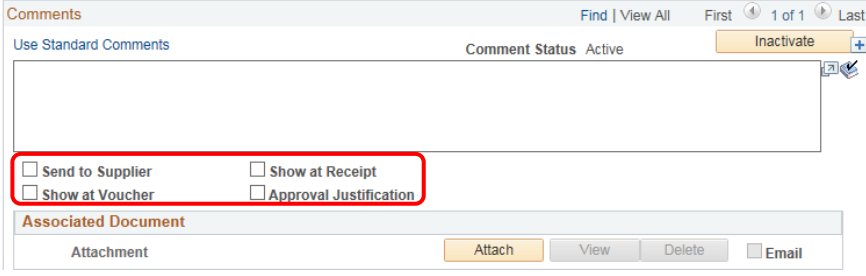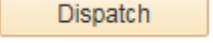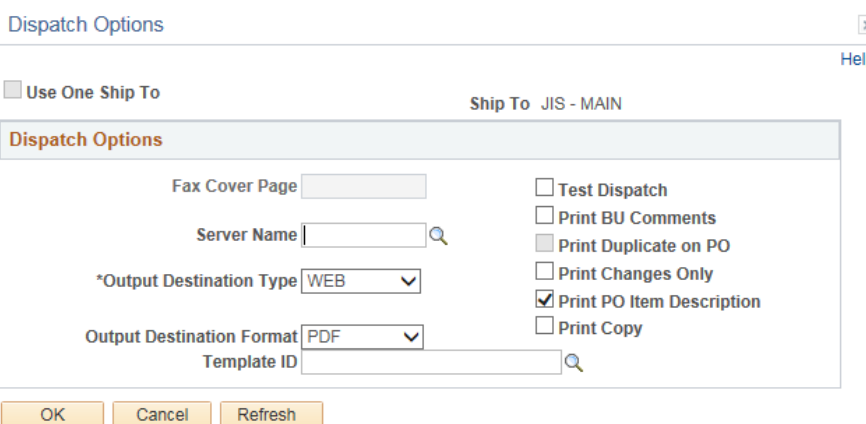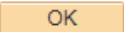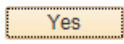
4b.	**For "Amount Only" Express POs –** On the Express Purchase Order **Purchase Order** screen, enter the amount change on the PO line. In this example, the PO Line 1 was increased from **$3,000.00** to **$3,500.00**.	
4c.	**For "Amount Only" Express POs –** Click the Save button.	
4d.	**For "Amount Only" Express POs –** A system message will display noting that the action will create a change order. To proceed with the change, click the Yes button. **NOTE:** If you select the No button, the system will not accept your changes and the field will remain unchanged.	
4e.	**For "Amount Only" Express POs –** If the PO saves successfully, the PO Status changes from 'Dispatched' to either 'Approved' or 'Pending Approval' (depending upon the total dollar amount of the PO), and the Budget Status changes from 'Valid' to 'Not Chk'd'. ****Skip to Step 8 to continue processing the Change Order for the Express PO amount change.**	
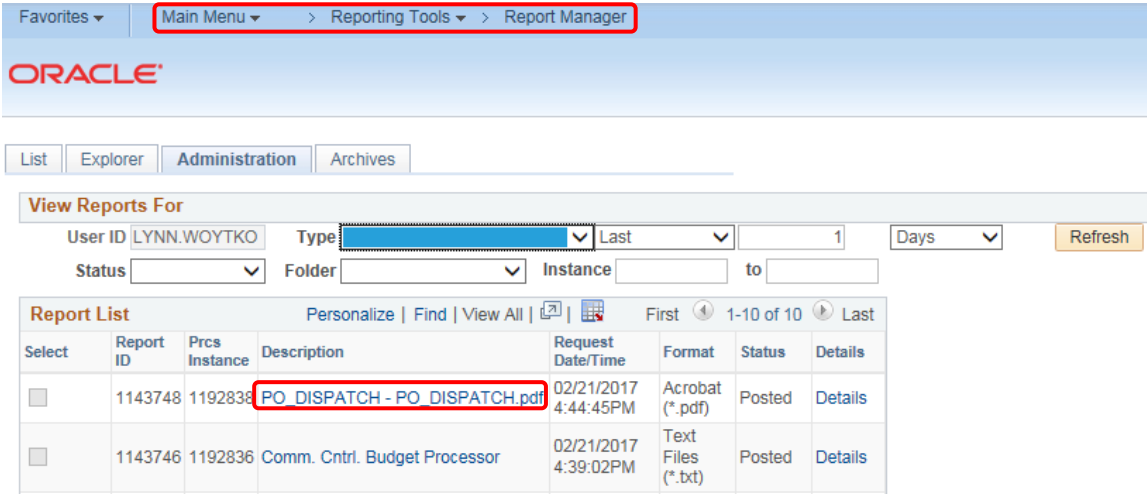
5a.	**For "Quantity-Based" Express POs –** **NOTE: Steps 5a through 5f allow you to change the quantity or price of the Express PO.** **The Express PO MUST be distributed by Quantity" to change the quantity or price.** In this example, PO ID *0000059457* is selected and the PO Quantity will be increased.	
5b.	**For "Quantity-Based" Express POs –** Express Purchase Order On the Purchase Order screen, enter the quantity change on the PO line. In this example, the PO Qty was increased from 50 to 60.	
5c.	**For "Quantity-Based" Express POs –** Click the Save button.	
5d.	**For "Quantity-Based" Express POs –** **A system message will display noting that the action will create a change order. To proceed with the change, click the Yes button.** **NOTE:** If you select the No button, the system will not accept your changes and the field will remain unchanged.	

5e.	**For "Quantity-Based" Express POs –** **Once the quantity has been changed, it is now possible to change the price (if needed). If a price change is not needed, skip this step.** On the Express Purchase Order <u>Purchase Order</u> screen, expand the Schedule Section, and enter the **price change** on the PO line. In this example, the Price was increased from 154.80 to 164.80. Click the **Save** button.	*(screenshot of Express Purchase Order – Purchase Order screen)*
5f.	**For "Quantity-Based" Express POs –** **If the PO saves successfully, the PO Status changes from 'Dispatched' to either 'Approved' or 'Pending Approval' (depending upon the total dollar amount of the PO), and the Budget Status changes from 'Valid' to 'Not Chk'd'.** ****Skip to Step 8 to continue processing the Change Order for the Express PO quantity/price change.**	*(screenshot of Express Purchase Order – Purchase Order screen)*
6a.	**For both "Quantity-Based" and "Amount Only" Express POs –** **NOTE: Steps 6a through 6h allow you to <u>add a line to the Express PO</u>.** **In this example, PO ID *0000055489* is selected.** On the Express Purchase Order <u>Purchase Order</u> screen, click the **+** plus sign button in the Lines section.	*(screenshot of Express Purchase Order – Purchase Order screen)*

6b.	**For both "Quantity-Based" and "Amount Only" Express POs –** **Confirm the number of rows to be added. If one row is to be added, leave the default, '1' in the field.** **In this example, only one row will be added to the Express PO.**	**mdcourts.gov needs some information** Script Prompt: Enter number of rows to add: `1` OK Cancel
6c.	**For both "Quantity-Based" and "Amount Only" Express POs –** **Click the** `OK` **button.**	
6d.	**For both "Quantity-Based" and "Amount Only" Express POs –** **A system message will display noting that the action will create a change order. To proceed with the change, click the** `OK` **button.**	**Message** This action will create a change order. (10250,178) This PO has been dispatched, add/delete/change a line or schedule will create a change order. `OK`
6e.	**For both "Quantity-Based" and "Amount Only" Express POs –** **On the** Express Purchase Order **screen, the new PO line is added.**	Lines — First 1-2 of 2 Last Line / Item / Description / PO Qty / *UOM / Category / Merchandise Amt / Status 1 Catering November 15 2016 1.0000 AMT 0401 330.00 Approved 229 characters remaining 2 0.000 Pending 254 characters remaining **In this example, this PO had 1 PO line and a 2nd line was added.**
6f.	**For both "Quantity-Based" and "Amount Only" Express POs –** **On the** Express Purchase Order **screen:** **The following are required fields:** • **Lines**: Description, PO Qty, UOM, Category. • **Schedules**: Due Date, Ship To, Price/Merchandise Amt. **NOTE**: If UOM on the line is anything other than "AMT", enter the unit price in the "Price" field, else enter the amount in the "Merchandise Amt" field. • **Distributions**: Account, Batch Agy, Fund, Program, Approp #, Approp Yr & PCA.	Lines — First 1-2 of 2 Last Line / Item / Description / PO Qty / *UOM / Category / Merchandise Amt / Status 1 Catering November 15 2016 1.0000 AMT 0401 330.00 Approved 229 characters remaining 2 0.000 Pending 254 characters remaining Schedules — First 1 of 1 Last Sched / *Due Date / *Ship To / *PO Qty / Price / Merchandise Amt / Status / *Distribute by 1 AOC-JIS-GN 0.000 Active Quantity Distributions Personalize	Find	View All	— First 1 of 1 Last Chartfields / Details/Tax / Asset Information / Req Detail / Statuses / Budget Information Dist / Status / Percent / PO Qty / Merchandise Amt / Curr / *GL Unit / Batch Agy / PCA / Fund / *Account / Program / Approp Number 1 Open 0.000 MDJUD C25 12013 3003 T001 A0012 **For additional information of how to complete a PO Line, refer to the Tip Sheet, Creating an Express Purchase Order on the GEARS website (http://mdcourts.gov/gears/pdfs/tipsheetcreatingexpresspo.pdf)**

6g.	For both "Quantity-Based" and "Amount Only" Express POs – Click the **Save** button.	
6h.	For both "Quantity-Based" and "Amount Only" Express POs – If the PO saves successfully, the PO Status changes from 'Dispatched' to either 'Approved' or 'Pending Approval' (depending upon the total dollar amount of the PO), and the Budget Status changes from 'Valid' to 'Not Chk'd'.	PO Status Approved Budget Status Not Chk'd ****Proceed to Step 7 to continue processing the Change Order for adding a line to the Express PO.**
7a.	To associate your new PO lines with a Contract (if necessary) - Associate your new PO lines with a Contract (if necessary) by clicking on the .	
7b.	To associate your new PO lines with a Contract (if necessary) - Enter the Contract ID and then click **Search**. Select the contract by clicking on the and then click **OK**. Now the PO line is associated with the Contract.	
8.	To add additional comments or supporting attachments:	**General Express PO comments/attachments:** • click the **Add Comments** Header link. • select a group to display your comments to. **Line specific comments/attachments:**

		• click the 💬 icon to the right of the Express PO Line. • select a group to display your comments to. **Click the** 🖫 Save **button.**
9.	**NOTE:** You cannot move forward with the remaining steps unless the Express PO is in "Approved" status. **Budget Check your Express PO.**	**NOTE:** Only upon an "**Approved**" PO Status will you be able to run the Budget Check process by clicking the Budget Check icon 🔍 . PO Status Approved Budget Status Not Chk'd 🔍
10.	**Dispatch your Express PO.**	**NOTE:** Only upon an "**Approved**" PO Status and a "**Valid**" Budget Status will you be able to run the Dispatch process by clicking the [Dispatch] button. Dispatching your Express PO is <u>required</u> in order to Receive and Voucher against the Express PO. *Dispatch Method [Print ▾] [Dispatch] **NOTE**: The Dispatch Method defaults to "Print" but can be changed to "Email" for those vendors who have an email address associated with their vendor information on the Vendor Master File maintained by DBF. *Dispatch Method [Email ▾] [Dispatch]
11.	**Confirm the Dispatch Options & complete your Express PO.** **NOTE**: You can click "No" rather than waiting for the Dispatch process to complete, however you will have to look up your Express PO to view the Dispatched status.	Dispatching via the "Print" method will display the following Dispatch Options. There is no need to alter these options, just click the [OK] button, then select [Yes] on the pop-up message to wait for the Dispatch process to

		complete. Waiting for this process to complete will allow you to view the Express PO status as Dispatched.
12.	**Your Express PO is complete.**	You will see the PO Status as "Dispatched" when the Dispatch process completes. PO Status Dispatched Budget Status Valid **NOTE:** The Express Purchase Order must have these statuses to be received and vouchered against.
13.	**Once Dispatched, you can review the PDF version of the Express Purchase Order in your Report Manager under the Administration Tab. Navigation:** Reporting Tools > Report Manager

 End of Document

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer to the appropriate User Procedures and/or online references for any corresponding policies regarding this process.